Authority Monitoring Report

Town Centres Bulletin

2012/13 to 2018/19

July 2019

Contents

Introduction

This Authority Monitoring Report bulletin (AMR) provides information about progress being made in implementing Policies SP6 (Successful Town and Local Centres) and INF5 (Town Centres Hierarchy and Network) and addressing stated objectives, by demonstrating how the Newham's planning policies are performing against five Local Plan Performance Indicators for the financial years 2012/13 to 2018/19.

The reporting period commences with the adoption of the Local Plan: Core Strategy in January 2012 (now superseded) and runs to March 2019. The bulletin therefore also includes monitoring against policy INF5a of the Local Plan: Detailed Sites and Policies Development Plan Document (DSPDPD, adopted October 2016 and now superseded) which designated new Shopping Parades. Finally, this AMR reflects on policy changes set out through the Local Plan Review (LPR) which culminated in the adoption of the Local Plan (2018), superseding the aforementioned documents.

Town Centre boundaries were amended though the DSPDPD as follows:

- Stratford: minor reduction of boundary;
- East Ham: minor extensions of boundary and addition to primary shopping frontage;
- Canning Town: substantially extended boundaries to reflect regeneration aspirations, minor amendment to the primary shopping frontage to reflect new layout of Rathbone Market;
- Forest Gate: extensions of boundary;
- Green Street: minor extensions of boundary, significant additions to the primary shopping frontage; and
- East Beckton: boundary drawn in to reflect functional area.

Boundary changes were also made to some Local Centres and Local Shopping Parades, including a series of new Local Shopping Parade designations.

Further minor changes to some town centre boundaries have been taken forward through the Local Plan 2018:

- East Ham: removal of a residential terraces at St Bartholomew's Road;
- Forest Gate: re-balancing north-south, with extension south along Upton Lane and removal of units to the west along Romford Road; and
- Stratford: drawn in to remove residential hinterlands, and reflect the Strategic Site S05: Stratford Metropolitan.

The boundary changes outlined above have by and large affected the 'hinterlands' or secondary frontages of town centres and not the primary shopping areas. Therefore, the data collected for town centres over the reporting period remains largely comparable. With the adoption of the Local Plan (2018), and in order to make the most of this bulletin as a baseline for further annual monitoring, this bulletin utilises the town centre boundaries set by the Local Plan (2018).This also makes it easier to adapt the data collected between 2012/13 and 2018/19 so that comparisons can be made on a like for like basis.

The figures contained within this document provide a snapshot from the plan period from which some conclusions can be drawn, as set out in the final section of the report. Any targets, including sought after trends, are set out between box brackets [ ] when each indicator is introduced. Indicators have been brought forward into the Local Plan (2018), sometimes with minor amendments; where this is the case, the revised indicator/target is given alongside the original one.

Data sources include in-house Use Class surveys carried out biannually (2014, 2016 and 2018), the Town Centre and Retail Study 2016 Update, GLA Town Centre Health Checks (2013 and 2017), planning applications and appeals monitoring, information sourced from other departments (e.g. corporate surveys, developer contributions and CIL monitoring) and other sources.

Given extensive regeneration activity which has taken place in Canning Town over the reporting period - with ongoing delivery of new frontages, particularly as part of the primary shopping frontage - the results from surveys carried out in 2014, 2016 and 2018 are not directly comparable. This is particularly relevant in terms of vacancy data, with percentages skewed by recently delivered units being vacant at the time of surveying. Below is a list of the major developments in Canning Town and their phase, year of completion, and when they were first surveyed:

- Rathbone Market: Phase 1, completed in 2012, first surveyed in 2014;
- Rathbone Market: Phase 2, completed in 2015, first surveyed in 2016;
- Rathbone Market: Phase 3, completed in 2017, first surveyed in 2018;
- Hallsville Quarter: Phase 1, completed in 2015, first surveyed in 2016;
- Hallsville Quarter: Phase 2, completed in 2018, first surveyed in 2018.

With regards to Stratford Metropolitan Town Centre, it should be noted that,unless otherwise stated, reporting focuses on the town centre area where the London Borough Newham is the Local Planning Authority and does not reflect the area that falls under the planning control of the London Legacy Development Corporation (LLDC).

Outputs

SP-OP6 Supporting Quality Town and Local Centres

i) Monitor Town Centre Management [Target: No specific target, monitor to ensure ongoing commitment to improvement]

The town centre management function within the Council was terminated in 2012. Therefore, there is no data available against this indicator.

However, it is notable that Stratford town centre businesses convened to create a BID in 2015 which will have similar management and investment functionality, though private business-led.

Environmental improvement schemes referred to in indicator SP-OP1ii of the Successful Places Monitoring Bulletin are key Council-led interventions that benefit town centres in several cases – Crossrail/LIP investment and other ongoing public realm enhancements for Stratford, Forest Gate and Canning Town.

In March 2019 the Council submitted expressions of interest to the Government's Future High Street Fund in relation to East Ham and Green Street. The fund aims to co-fund transformative, structural changes to overcome challenges faced by town centres.

ii) Monitor Community uses in Town Centres [Target: No specific target]

The spatial strategy set out in Policy INF8 of the Local Plan: Core Strategy and detailed through Policy INF10 of the Local Plan: DSPDPD (now Policy INF8 of the Local Plan 2018) directs community facilities primarily to town and local centres, or if no suitable sites are available, to CFOAs (edge of centre locations designated through the DSPDPD) that are well connected to the centre, so that they benefit from highest level of accessibility and visibility.

This monitoring indicator reviews applications that involve the creation of new D1 or D2 units against the policy locational criteria as set out above. Further information on other types of applications, including net gains and losses of community facility floorspace, is available in the Community Facilities Monitoring Bulletin (2013–2018).

Table SP-OP6ii.a overleaf tracks the approval of new, permanent community uses falling within Use Classes D1 and D2 over the reporting period. It indicates that the majority of approved community facilities are located within town and local centres, Strategic Sites in line with their allocation, or CFOAs (following designation through the DSPDPD, 2016) or other suitable (as per the Officer/Committee Report) edge-of-centre locations (39 out of 68). The remaining out of centre approved applications include a new primary free school in the Stratford area and 5 nurseries, and other smaller scale community facilities that would be expected to serve a local population and not have an unacceptable impact on the town centres network.

Table SP-OP6ii.a: Approved applications including new community uses*

	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	Total
Number of applications for/ including D1 or D2 uses approved:	**11**	**12**	**9**	**9**	**10**	**8**	**9**	**68**
Of which in a town centre or local centre	4	3	4	3	6	5	3	**28**
Of which in a CFOA or acceptable edge of centre location	1	5	2	1	1	1	0	**11**
Of which otherwise on a Strategic Site	0	1	1	0	0	0	3	**5**
Number of applications for/ including D1 or D2 uses on strategic sites**	**4**	**2**	**3**	**1**	**4**	**1**	**6**	**21**

* excludes temporary uses, intensification of existing uses, and changes of use between D1/D2.
** includes strategic sites in town centre location as well as out of centre strategic sites

Table SP-OP6ii.b.sets out further information on applications approved in town centres that provide new community facility uses in Use Classes D1 and/or D2. It indicates that the primary new community facilities approved in Newham's centres were leisure uses (Use class D2), with the exception of East Beckton and Green Street. East Ham also experienced considerable growth in post-16 education uses, while approvals for Canning Town and East Beckton include health and education facilities. Forest Gate and Green Street have had approvals for new tuition centres.

Table SP-OP6ii.b: Approved new community uses in town centres

Town Centre	Planning Ref.	Permission date	Net sq.m D1 use	Summary description
Stratford	11/02094 /FUL	27/02/2012	1068	Use of building for range of uses including leisure (D2)
	14/00586 /FUL	14/05/2014	120	Change of use to levels 7 and 8 of the existing car park to urban park including leisure facilities (D2)
	14/01703 /COU	22/12/2014	500	Change of use from A3 to gym (D2)
	14/02289 /FUL	25/01/2016	u/k**, up to 4,539	Strategic mixed use development including leisure (D2)
	17/01051 /FUL	13/06/2017	1,878.7	Temporary change of use to mixed use including trampoline park (D2)

Town Centre	Planning Ref.	Permission date	Net sq.m D1 use	Summary description
East Ham	13/01372 /LA3	17/10/2013	2,976	Change of use of Old Technical College, Ex Forward Planning Office and Old Library to Newham Collegiate Sixth Form Centre (D1)
	13/01760 /FUL	19/12/2013	150	Change of use from A1, A2 and A3 to Education&Training Centre (D1)
	13/01805 /FUL	03/02/2014	427	Change of use from A2 to Place of Worship (D1)
	14/01549 /FUL	22/10/2014	1,363	Change of use from A1 to health and fitness centre (D2)
	15/01946 /LA3	22/10/2015	584	Change of use of East Ham Town Hall Extension to 7 additional classrooms for the Technical College (D1)
	14/01523 /FUL	12/04/2016	5,383	Conversion of the East Ham Police Station to University Technical College (D1)
Canning Town	11/00662 /LTGDC	28/03/2012	u/k*, up to 8,550	Strategic mixed use development including leisure (D2) and community and healthcare (D1)
	12/01448 /COU	11/10/2012	912	Change of use to gym (D2)
	16/03778 /FUL	02/02/2017 (extended)	4,220	Temporary change of use of vacant retail warehouse to multi-activity leisure/ entertainment (D2).
	16/03428 /FUL	26/10/2017	u/k*, up to 3,000	Strategic mixed use development including provision of flexible floorspace to accommodate inter alia leisure (D2) and a nursery (D1).
	17/03907 /COU	17/01/2018	98	Change of use from vacant marketing suite to learning centre (D1)
Forest Gate	16/03486 /COU	22/12/2016	106	Change of use from A1 to tuition centre (D1)
	17/02199 /COU	27/10/2017	120	Change of use to mixed use including a tuition centre (D1)
	17/02609 /FUL	25/01/2018	u/k*, up to 216	Redevelopment to mixed use including flexible floorspace (D2)
East Beckton	15/02490 /FUL	03/11/2015	210	Change of use from A2 to education centre (D1)
	17/02684 /COU	18/10/2017	144	Change of use from office (B1) to dental surgery (D1)
Green Street	18/02218 /COU	19/11/2018	62	Retention of change of use to class D1 Tuition Centre.

* unknown, subject to strategy to occupy flexible use floorspace;

iii) Monitor Town Centre Investment [Target: No specific target, monitor for investment interest and LPR: increased diversity of uses in town centres]

Major planning applications approved within town centres provide important sources of investment, not least through improvements to public realm and the quality and range of town centre uses on offer, and by bringing in additional population to increase spending power and footfall.

Table SP-OP6iii below outlines private or partnership investment commitments into each of the town centres since the adoption of the Core Strategy, based on permitted major schemes.

Table SP-OP6iii: Mix of uses committed to through major applications approved since January 2012

Town Centre	Details of committed investment	Broad phasing assumptions
Stratford Metropolitan (incl. Strategic Site S05)	• At least 728 new homes • 2,764 sq.m office floorspace • 4,700 sq.m flexible A1/A2/A3/A4/D2 Use Classes floorspace • 1,688 sq.m of D2 Use Class (leisure) floorspace • 298 hotel rooms	2015-2028
East Ham (incl. Strategic Sites S25 and S26)	• At least 596 new homes • 2,120 sq.m A1 Use Class (retail) floorspace and 2,714 sq.m flexible A1/A2/A3/A4 Use Classes floospace. • 1,871 sq.m D2 Use Class (leisure) • 12,075 sq.m D1 Use Class (community facilities) floorspace, including higher education • 24 hotel rooms	2014-2029
Canning Town (incl. Strategic Sites S14, S13, S16, S17)	• At least 2,350 new homes, and up to 12,000 sq.m towards specialist housing • At least 29,747 sq.m flexible A1/A2/A3/A4/A5 Use Classes floorspace, including an 8,200 sq.m supermarket (retail). • Circa 5,000 sq.m (B1a) office floorspace with a further 3,137 sq.m B1 floorspace, including a Research and Development centre. • At least 4,412 sq.m D2 Use Class (leisure) floorspace • At least 3,000 sq.m D1 Use Class (community facilities) floorspace, including a health centre and a nursery • 348 hotel rooms	2012-2024

Town Centre	Details of committed investment	Broad phasing assumptions
Forest Gate (incl. Strategic Site S24)	• At least 188 new homes • 1,233 sq.m flexible A1/A2/A3 Use Classes floorspace • 226 sq.m D1 Use Class (community facilities) floorspace • Up to 216 sq.m of D2 Use Class (leisure) floorspace	2015-2023
Green Street (incl. Strategic Site S27)	• At least 21 new homes • 4,602 sq.m flexible A1/A2/A3 Use Classes floorspace	2015-2020
East Beckton	• 354 sq.m D1 Use Class (community uses) floospace • 32 hotel rooms	2015-2018 (delivered)

Source: London Development Database and Uniform

In addition, there have been a series of public sector investment schemes:

- Shop front improvement scheme (2012 heritage lottery funding) for Forest Gate and Green Street town centres;
- Public realm improvement schemes (ongoing) related to Crossrail at Forest Gate and Stratford.

Significant investment has also been secured as part of major schemes on strategic allocations S29, S22, S21, S19, S11 that will deliver new local centres to support the local existing and emerging communities. Moreover, the long-term aspiration to build on the success of Gallions Reach Shopping Park for the delivery of a new metropolitan town centre has been further strengthened through the new strategic allocation of the Local Plan (2018), Beckton Riverside (S01), which highlights the opportunity to achieve this aspiration as part of the coordinated, masterplanned delivery of the wider site.

The Spatial and Strategic Monitoring Bulletins set out in more detail major applications approved over the reporting period on Strategic Sites.

INF-OP5 Strategic Management of the Town Centre Network

i) Floorspace for town centre uses [Target: increase in town centres, subject to strategic regeneration ambitions elsewhere in the Borough].

Table INF-OP5.ia overleaf monitors completions for some main town centre uses (defined through the NPPF) – retail (A1 Use Class), retail services (A2 Use Class), office use (B1(a) Use Class), and leisure (D2 Use Class) (N.B. Use Class D1 community uses are covered by the previous indicator). It shows that town centres have been the primary focus of investment in renewal of floorspace, concentrating 82.47% of the total new/renewed floorspace in these uses.

Table INF-OP5.ia: Change in Town Centre floorspace (sq.m) 2012/13 to 2018/19

Town Centre	Type	A1 sq.m	A2 sq.m	B1a sq.m	D2 sq.m	Total sq.m
Stratford	New/renewed floorspace (gross)	1,054	463	6,666	150	**8,333**
	Net loss/gain floorspace	338	463	-2,751	150	**-1,800**
East Ham	New/renewed floorspace (gross)	60	120	2,118	1,363	**3,661**
	Net loss/gain floorspace	-1,750	72	-2,502	1,363	**-2817**
Canning Town	New/renewed floorspace (gross)	13,066	2,195	1,390	0	**16,651**
	Net loss/gain floorspace	9,741	1,997	-228	0	**11,510**
East Beckton	New/renewed floorspace (gross)	0	0	0	0	**0**
	Net loss/gain floorspace	0	0	0	0	**0**
Forest Gate	New/renewed floorspace (gross)	0	0	0	0	**0**
	Net loss/gain floorspace	-40	0	-101	-120	**-261**
Green Street	New/renewed floorspace (gross)	3,455	413	102	0	**3,970**
	Net loss/gain floorspace	2,816	234	102	0	**2,842**
Local Centres	New/renewed floorspace (gross)	240	0	0	0	**240**
	Net loss/gain floorspace	154	-293	0	0	**-139**
Strategic Sites* outside town or local centre	New/renewed floorspace (gross)	364	158	2,861	208	**3,591**
	Net loss/gain floorspace	364	158	-5,129	208	**-4,399**
Other outside town or local centre	New/renewed floorspace (gross)	1,423	361	3,994**	9,315	**15,093**
	Net loss/gain floorspace	-2,768	-839	-9,409**	2,418	**-10,598**
Borough wide total	New/renewed floorspace (gross)	18,548	3,127	8,347	9,523	**39,545**
	Net loss/gain floorspace	9,683	1,257	-14,765	2,506	**-1,045**

Source: LDD completions monitoring; * Excludes commercial development delivered on strategic sites where the overall development/phase is still under construction. ** Of which on designated employment land (SILs, LILs, LMUAs): 1,345 sq.m new office floorspace, and -3,941 sq.m net loss of office floorspace.

Canning Town is the main beneficiary, with extensive regeneration and expansion of floorspace. See Table SP-OP6iii above for further detail.

Stratford has seen limited growth in retail and retail services, with more notable renewal of office stock, albeit registering an overall reduction in net B1a floorspace over the reporting period. This is likely to be offset by significant further office developments approved, as highlighted by Table SP-OP6iii above.

East Ham has experienced considerable net decline in retail and office floorspace. However, this is in part compensated by investment in the expansion of its post-16 education offer (see Table SP-OP6iii above), and new retail development in the pipeline as part of the redevelopment of sites on Strategic Site S25: East Ham Market.

Green Street has seen a significant boost in its retail floorspace following the completion in 2015 of East Shopping Centre, on the site of a former bus depot.

Forest Gate has seen a small reduction in retail, office and leisure floorspace, while awaiting delivery of approved major schemes on Strategic Site S24: Woodgrange Road West (see Table SP-OP6iii above).

East Beckton town centre has remained stable. Local Centres have also remained by-and-large stable, with limited change. These areas would however have had more limited scope to evolve over the monitoring period, given their small size (compared to the other town centres) and existing uses.

Leisure development floorspace delivered over the reporting period has primarily been focused in out-of-centre locations, specifically represented by the rebuilt Atherton Leisure Centre (5,427 sq.m, a net gain of 707 sq.m), and the conversion of former Greenhill Centre, High Street North (1,399 sq.m) and former offices at Roding House, Romford Road (1549 sq.m) to gyms.

It is worth noting that office space has seen a net decrease across the borough, but this is expected to be compensated by significant development in the pipeline on strategic sites, particularly in Stratford and the Royal Docks Enterprise Zone. Most of the lost office space has been replaced by residential, either through conversion or redevelopment. Further information on office and other employment uses is available in the Economy Bulletin (2013-2018).

Table INF-OP5.ib overleaf outlines additional retail growth capacity as set out by the Town Centre and Retail Study 2016 update (2014/2015 baseline) for each of the borough’s shopping sub-areas, together with the net gain/loss of A1 Use Class (retail) floorspace within the town centres between 2015/16 and 2018/19. It indicates that significant growth capacity remains for all town centres, except Canning Town which shows overprovision. Nevertheless, the Town Centre and Retail Study noted that, while level of need for the south-west sub area (Canning Town) is exceeded, the additional floorspace will enhance the quality and attraction of the retail offer, thereby achieving trade ‘claw-back’ and a consolidated market share.

Table INF-OP5.ib: Forecast retail floorspace capacity from 2014/15 baseline, by market sub-areas (sq.m.)

Sub Area (Town Centres)	**Convenience floorspace**		**Comparison floorspace**		**Total A1 need to 2020**	**Total A1 need to 2025**	**Net A1 completed in town centre 2015/16-2018/19**
	2020	**2025**	**2020**	**2025**			
North West (Stratford*)	2,338	4,420	20,371	52,392	22,709	56,812	1,150
South East (East Ham, Green Street & East Beckton)	982	3,126	5,276	12,844	6,258	15,970	-161
North East (Forest Gate)	38	81	195	535	233	616	0
South West (Canning Town)	121	253	62	136	183	389	2,622

* Including LLDC town centre area;

ii) Delivery of town centre strategic sites and new centres as part of strategic sites [Target: in line with timescales envisaged in sites schedule].

As per indicator SP-OP6.iii above, and the Spatial and Strategic Monitoring Bulletins.

The Strategic Sites allocated through the Core Strategy (2012) to deliver new Local Centres are: S08-Thames Wharf; S11-Parcelforce; S19-Albert Basin; S21-Silvertown Quays; S22-Minoco Wharf; and S29-Plaistow North.

Local Plan (2018) has allocated two further strategic sites that will contribute to the town centres network: at S20-Lyle Park West, to deliver a small local centre adjacent the DLR station; and at S01-Beckton Riverside, which will deliver, inter alia, on the long-standing aspiration of a new major town centre building on the strengths of Gallions Reach Shopping Park.

iii) Conversion of out of centre commercial to residential use [Target: no specific target, but should be a sustained pattern].

This indicator tracks conversions from A1, A2, A3 and A5 Use Classes to residential, as supported by policies SP6, SP7, J1 and INF5 (as well as Policy H1 of the Local Plan 2018).

A4 uses (pubs) are excluded on the basis that in many cases these are also considered a community facility (a fact formalised by the Local Plan 2018 Policy INF8). See the Economy Bulletin (2013-2018) for further assessment.

As Table INF-OP5.i above indicates, there has been a net decrease in out-of-centre A1/A2 uses. Of the 33 applications pertaining to existing A1/A2 uses located out-of-centre and not on strategic sites, 22 (totalling 4,211 sq.m commercial floorspace) were for full conversion or redevelopment to residential. A review of planning applications also reveals that there have been 3 permissions for conversion of out-of-centre hot food takeaways (Use Class A5) to new residential units over the reporting period. This indicates that the policy is working, albeit the number of conversions remains small compared to the historic proliferation of ribbon commercial development. Therefore, it is important to allow the process to continue though policy stability.

See also indicator INF-OP-9 below on policy use and robustness.

INF-OP-9 Use and Robustness of INF Policies

[Target: withstands appeal and is used appropriately in a sample of relevant decisions];

Note this assessment excludes applications involving development of the following town centre uses:

- Existing A4 uses (pubs), on the basis that in many cases these are also considered a community facility (a fact formalised by the Local Plan 2018 Policy INF8).
- Similarly,D1 (community) and D2 (leisure) uses are not considered here – see the Community Facilities Monitoring Bulletin (2013-2018).
- B1a uses (offices) have also been excluded as these are considered more representative of the wider employment strategy (of which town centres are a part of) and are addressed under the Economy Bulletin (2013-2018).

The primary Policy under consideration is INF5 (Town Centres Hierarchy and Network), as supported by Policy SP6 (Successful Town and Local Centres). Furthermore, as most commercial out of centre uses are present along historic high streets, this indicator is closely linked to the application of Policy SP7 (Key Movement Corridors and Linear Gateways). Together, these three policies seek to consolidate ribbon development into designated town and local centres, and where this is not possible, resist development (either change of use or extensions) that would futureproof out-of-centre commercial uses in favour of the status quo.

The application of these policies by Officers has been largely consistent, with most developments (change of use, extension or redevelopment) being refused when including a continued A1/A2/A3/A5 use outside a designated area or not consistent with a site allocation, and the vast majority of subsequent appeals being refused.

The table in Appendix 1 lists applications relating to out-of-centre A1/A2/A3/A5 development that have been approved over the reporting period, excluding Strategic Sites – 18 applications in total. It shows that only one major out-of-centre commercial floorspace development (over 500sqm) has been approved (at Pontoon Dock, see below), indicating that the spatial strategy and the impact threshold of 300m set by Policy INF5 are successful at guiding large scale commercial development towards existing or emerging town and local centres.

Three of the approved applications represent major development with an element of flexible commercial/community uses:

- Development at Pontoon Dock (Housing Site allocation HSG30), under construction, 769sq.m of flexible A1/A2/A3/B1/D1/D2 uses, acceptable given adjacent DLR station and small scale serving local need while activating the frontages of a key public space..
- Redevelopment at former West Ham United Football Club, under construction, 146sq.m of flexible A1/A2/A3/A4/B1/D1/D2 uses, below impact test threshold of Policy INF5 (300sq.m), and considered acceptable in the overall strategic, edge of centre context of that development.
- We5b Western Gateway site, completed, 172sq.m flexible A1/A2/A3/A4/B1 uses, below impact test threshold of Policy INF5 (300sq.m), acceptable in Excel and Royal Victoria West Employment Hub, where leisure and business uses are encouraged.

A further 5 approvals have related to the intensification of existing retail parks in Beckton area (4 implemented, 1 lapsed), mostly for food and drink uses (A1/A3/A5) which were considered acceptable as ancillary to the existing retail uses and thereby not considered to draw trade away from town centres. However, while individually these are small scale, the cumulative impact of these has not (and could not have been) been considered. The Local Plan 2018 is seeking to bolster town centre policy relating to such uses by more explicitly directing evening and night time economy uses to town centres and a few other specific locations in and around the Royal Docks.

Of the remaining 11 approved minor applications, 6 represented extension developments that failed to address town centre policies but which prove more difficult to resist, a further 4 failed to consider policy SP7 preference for the status quo, and in one recent approval, the Officer gave weight to an allowed appeal in the same out of centre parade. However, the majority of these applications are from the first few years following adoption of the Core Strategy, with better application of the town centre first strategy and increased policy success occurring as policy has been allowed to 'bed down'.

Policies SP6 and INF5 have been tested at appeal on numerous occasions and have withstood the scrutiny of the appeals process. The promotion of 'town centres first' policy is referenced frequently by Inspectors in relation to proposals located outside of designated centres and shopping parades. For example, in the case of a 2014 appeal dismissal at 370a Romford Road, E7 8BS against refusal of change of use from retail (A1 use class) to A2 (accountancy practice), the Inspector made the following comments:

> *"[The] broad thrust of the Development Plan policy background is to provide for strong and vibrant centres whilst tackling the sprawl of retail and service uses outside centres along the borough's main transport routes. The location of the site […] would be likely to encourage trade leakage from the centre and would not contribute to the desired development of the centre […]. It would also support the unfocused sprawl along this key movement corridor detracting from the role of Romford Road as a high quality movement corridor and linear gateway. […] I consider that, if the proposed change of use were to be permitted on such an ad hoc basis outside the designated town centre area contrary to Development Plan policy, it would undoubtedly make it more difficult for the Council to refuse other applications for similar development elsewhere in the borough. The cumulative impact of such development would, in the long-term, be likely to detract from the vitality and viability of the existing town and local centres. I conclude that to grant permission for the proposal would undermine the Council's retail strategy which seeks to ensure the vibrancy and vitality of designated town and local centres."*

Moreover, in the more recent dismissed appeal case of 260 Barking Road, E6 3BA (2017), the Inspector concluded that the "*policies are still recent […] and provide a robust analysis of retail issues in the area; as such, a [land-use] survey is unnecessary […] given the evidence set out within the Core Strategy and the existing high concentration of non-retail uses along this part of Barking Road*". The Inspector went on to consider that the Council's concerns about out of centre ribbon development, as set out within its development plan policies, are justified. With the recent re-testing of town centres policies at examination as part of the Local Plan Review, Policies INF5, SP6 and SP7 have been re-affirmed.

Seventeen out of the 47 appeals against refusal of permission for, or enforcement against, commercial additions, extension or change of use along outside of

Town/Local Centres were allowed. In the case of 10 appeals assessment may have benefitted from stronger emphasis on the requirement of Policy SP7 to convert out of centre ribbon development into residential or maintain the status quo. Where appeals have been allowed in spite of Policy SP7, the Inspectors took the view that continuing a small scale existing commercial use, when clearly part of a non-designated but vibrant parade, would not result in unacceptable town centre impacts; however no consideration of the potential long term cumulative impact of allowing the continued use was made. In 2 of the 30 dismissed appeals, town centre policies were not adequately utilised as a reason for refusal, with dismissal being on other grounds (i.e. loss of family housing, the other for amenity impacts) forming the main focus of assessment.

In the round, the town centres policies have proven effective at protecting and promoting the health and vitality of the town centres network and policy usage and appeal success has increased as policy has been able to bed down (from 2012 – 2019). Monitoring of implementation continues to be important.

Outcomes

SP-OUT4 Town Centre Health

The data against this indicator is drawn from in-house Town Centres Survey carried out during the summers of 2014, 2016 and 2018. While the Town Centre and Retail Survey 2010 and its 2016 update provide similar statistics, these commissioned studies are based on GOAD data available at that time as opposed to on-site surveys, and are therefore a less reliable/ up to date source of data. They nevertheless provide important qualitative information.

It should also be noted that the use classes assigned through the Town Centre Survey work are indicative of the observations on the day of survey, and should not be taken to confer lawful use status.

A unit is defined in relation to street naming and numbering (i.e. frontages), meaning that where businesses occupy several units they are still reported as separate entities albeit in the same use class. However, this approach results in a data set that paints a picture that is different to the way people experience the town centre. Therefore, the Town Centre Survey 2018 has been undertaken in a way that allows for both types of assessment (units as well as businesses), with the intention that all future monitoring will follow this method and allow for better understanding of town centre frontages, and therefore better implementation of policy.

i) Vacancy levels, and non-retail uses in primary frontages in town centres [Target: No specific target, monitor for downward trend or sustained low levels] [LPR target: No specific target, should be holding steady or improving, noting PSF benchmark in SP9]

a) Vacancy Levels

Table SP-OUT4i.a sets out the results of the surveys carried out and highlights that Newham's town centres perform well in terms of vacancy rates compared with the national average.

Table SP-OUT4i.a – Unit Vacancy Levels

Town Centre	2014	2016	2018
UK average	11.9%	11.5%	11.2%
Stratford	10.3%	7.3%	8.2%
East Ham	3.0%	2.7%	2.84%
Canning Town	3.1%	8.3%	7.8%
Forest Gate	8.9%	8.2%	10.6%
Green Street	6.1%	5.0%	6.4%
East Beckton	3.6%	10.7%	10.7%

Sources: in-house Town Centres Surveys; UK averages from Local Data Company (2019), high street vacancy rate for first half of the year;

East Ham is the best performing town centre in terms of vacancy rates, considerably outperforming the borough's other centres (with the exception of East Beckton in absolute number terms) and the national town centre average on this statistic. Green Street also continues to perform well, as a reflection of its specialist ethnic focus with wider-than-local trade draw. Both have retained stable vacancy rates over the monitoring period.

East Beckton town centre is formed of a small number of units and the Asda Superstore, and therefore any vacancies in its frontages (2 units since 2016, the bus driver mess room and the former police station) have a disproportionate effect on the vacancy rate.

In Canning Town extensive redevelopment around Rathbone Market and Hallsville Quarter (Strategic Site S14) are significantly altering the scale and type of commercial offer of the town centre. However, the staged delivery means that the town centre remain in transition, with high vacancy rates including much of Rathbone Market (part of the PSF) as well as the superstore at Hallsville Quarter. Given that the town centre's regeneration programme will, overall, deliver significantly more capacity than identified as needed for this area by the Town Centre and Retail Study 2016 Update (see Indicator INF-OP5 above), vacancies may in part be attributed to insufficient local market demand. Therefore, in addition to ongoing monitoring, the need for robust market testing and marketing strategies (in line with revised Policies INF and J1 of the Local Plan 2018) is highly relevant for further commercial development of Canning Town Town Centre.

Stratford 'old' town centre continues to perform well, with similar vacancy rates compared to its Stratford City counterpart (under LLDC planning control). LLDC monitoring indicates that Stratford City retail vacancies stood at 6.2% in 2016 and 7.6% in 2018. Further investment through implementation of development at Morgan House should further boost the vitality of the town centre. Ongoing monitoring and cross-boundary engagement will continue to be important to maintain a balance between the vitality and viability of the two parts of Stratford town centre.

Forest Gate has experienced higher vacancy rates throughout the monitoring period, though still below national averages. However, it should be noted that this is in part as a result of land hoarding at 39A to 49A Woodgrange Road (12 units) in support of redevelopment which will deliver a new town centre frontage (16/02395/FUL) including floorspace for a medium-sized food store (in line with Policy S6 requirement for Forest Gate) and a smaller retail unit. Elsewhere, the level of change between surveys suggest a high degree of operator turnover, which may be an aspect of the town centre's more experimental/entrepreneurial focus.

<u>b) Non-retail uses in primary frontages</u>

Results of the Town Centre Surveys are outlined in Table SP-OUT4i.b overleaf. Overall, town centres are performing well against the benchmark set out in policy SP10 of the DSPDPD (superseded by Policy SP9 of Local Plan 2018) which requires no more than 30% of primary shopping frontages to be taken up by non-retail uses (other than Use Class A1, and excluding vacant units).

Table SP-OUT4i.b – Non-retail units in primary frontages*

Town Centre	2014	2016	2018
Stratford	15.7%	14.6%	13.5%
East Ham	18.1%	20.8%	25.5%
Canning Town	11.1%	16.0%	25.9%
Forest Gate	25.5%	21.3%	14.9%
Green Street	16.1%	11.2%	10.3%
East Beckton	53.0%	36.8%	41.1%

Source: in-house Town Centres Surveys;
* Excludes vacant units;

Stratford, Forest Gate and Green Street have each seen a steady decrease in non-retail uses in the primary shopping frontage, while the reverse has been happening in East Ham and Canning Town and will need to be monitored to ensure a robust retail core is maintained.
East Beckton is the only town centre where non-retail uses occupy more than 30% of the primary shopping frontages. However, this percentage is skewed by the typology of the town centre based on the Mary Rose Mall which is dominated by the ASDA Superstore. Similarly, there are a small number of units within the primary frontage of Canning Town (15 in 2014, 25 in 2016 and 27 in 2018), which is affecting ratios.

While performance is good, the relaxation of development control in shopping frontages through the Town and Country Planning (General Permitted Development) (England) Order 2015 (and more recent proposed amendments), together with other macro-economic challenges that the retail sector is experiencing, continue to pose a risk to the health of town centres and their ability to retain a core A1 retail function. In addition, many of the new commercial units coming forward as part of larger schemes have been approved as flexible spaces (e.g. A1-4, sometimes with potential for community facility use). Whilst an enhanced mix of uses is encouraged throughout a town centre, a critical mass of A1 as a footfall driver will continue to be important in most cases in primary shopping frontages, and impacts will require continued monitoring.

ii) Historic buildings at risk within defined town centres [Target: No specific target, should be decreasing]

Since 2012 only three historic buildings within defined town centres have been entered onto Historic England's Buildings at Risk register.

The Technical College in East Ham was on the register until 2014 when it was refurbished and re-purposed as Newham Collegiate Sixth Form.

West Ham Court House, at a prominent location in the historic context of Stratford, is vacant and remains a building at risk (since 1998). A February 2019 planning application and listed buildings consent for preliminary repairs has been submitted, with the cost of the works supported by the Council's Capital Funding including grant monies from Historic England. If approved, the remedial works will help secure the structural integrity of the building, though it will likely remain 'at risk' until brought back into use.

Alice Billings House, adjacent the West Ham Court House in Stratford, received national designation in Jan 2017 (together with ‘at risk’ status) and is also vacant and in poor condition. The Council is exploring options for its re-use.

Finally, while not on the At Risk register, Canning Town Library has been vacant since the library function relocated to adjacent Rathbone Market new-build Community Hub. While a planning permission was submitted in 2018 for change of use of ground floor to restaurant and flexible use A3/B1/D1/D2 at first floor, the application was withdrawn following significant community objection to the proposal.

iii) Quality Leisure: Proportion of leisure uses in town centres that are betting shops, amusement arcades and hot food_takeaways [Target: No specific target, monitor for downward trend or sustained low levels]

For the purpose of this indicator, leisure uses are defined cafes and restaurants (A3 Use Class), A4 drinking establishments (A4 Use Class), hot food takeaways (A5 Use Class) or leisure (D2 Use Class), as well as theatres, night clubs, betting shops and amusement arcades (all Sui Generis Use Class). Policy SP10 of the DSPDPD(superseded by Policy SP9 of Local Plan 2018) identifies hot food takeaways and betting shops or amusement arcades as leisure uses ‘subject to control’, and cafes, restaurants, drinking establishments and leisure D2 uses as ‘quality leisure’. While policy does not specifically refer to theatres and night clubs, their presence in the borough’s town centres being less prominent, these are considered here as ‘other leisure’.

Tables SP-OUT4iii.a below identifies the percentage of units/frontages in leisure uses as identified by the Town Centre Surveys in 2014, 2016 and 2018. Following on, Table SP-OUT4iii.b (overleaf) presents the percentage of actual business in leisure use, as identified by the Town Centre Survey 2018. Both tables then highlight the proportion of ‘quality leisure’ vs leisure use ‘subject to control’, by units and businesses respectively, in line with policy objectives set through Policy SP9 (previously SP10 of the DSPDPD) – that is, no more than 33% as leisure use ‘subject to control’.

Table SP-OUT4iii.a - Quality of leisure units in town centres

Town Centre	Units in leisure use* as proportion of all units			Percentage of leisure units which are ‘subject to control’		
	2014	2016	2018	2014	2016	2018
Stratford	14.7%	17.2%	21.0%	17.2%	17.4%	20.5%
East Ham	16.3%	16.8%	15.2%	63.3%	54.8%	55.6%
Canning Town	12.0%	12.50%	16.1%	47.8%	41.6%	32.2%
Forest Gate	15.8%	15.1%	16.5%	53.7%	59.0%	50.0%
Green Street	10.5%	9.1%	10.3%	48.7%	44.1%	42.5%
East Beckton	21.4%	21.4%	21.4%	16.6%	16.6%	16.6%

Sources: In-house Town Centres Survey work;
* Includes Use Classes A3, A4, A5, D2, some Sui Generis (theatres, night clubs, betting shops and amusement arcades).

Table SP-OUT4iii.b - Quality of leisure businesses in town centres

Town Centre	Leisure uses* as proportion of all uses	Percentage of leisure uses which are 'subject to control'
	2018	2018
Stratford	14.7%	27.7%
East Ham	16.0%	56.6%
Canning Town	14.3%	26.9%
Forest Gate	17.9%	53.8%
Green Street	10.5%	47.1%
East Beckton	20.0%	20.0%

Sources: In-house Town Centres Survey 2018;
* Includes Use Classes A3, A4, A5, D2, some Sui Generis (theatres, night clubs, betting shops and amusement arcades).

Over the reporting period Stratford Metropolitan and East Beckton are the only town centres that consistently achieve the quality benchmark set out in DSPDPD Policy SP10 of no more than 33% of leisure uses being betting shops, amusement arcades or hot food takeaways. The benchmark has also been achieved in Canning Town in 2018 following diversification of leisure uses, together with small reduction in takeaways.

Stratford is the main focus for leisure uses in the borough, as would be expected of a metropolitan centre, with a complementary offer within Stratford City in the LLDC area. The quality of the leisure offer is good and diverse, including a theatre (Theatre Royal) and a night club (Swagga). Further complementary leisure uses are provided on the LLDC side of the town centre.

East Beckton town centre is formed of a small number of units focused around the Asda Superstore and several large floorplate single-use buildings (Premier Inn, the Beckton Globe, St Marks Church), and is therefore prone to disproportionate ratios. Over the reporting period there were actually only 5 leisure uses, of which one is a betting shop. While the quantity and diversity of leisure offer in the town centre is low, the mix meets the policy benchmark. Careful monitoring will be needed of the effects of recent increases in leisure uses in the out-of-centre retail parks of the wider Beckton area that would cumulatively detract from establishing East Beckton town centre as the leisure destination for the area.

Forest Gate and East Ham are both performing relatively well in terms of overall provision of leisure uses, but the quality of provision remains low given high number of betting shops/amusement arcades and hot food takeaways.

The overall leisure offer within Green Street is more restricted compared to the borough's other town centres, and remains predominantly of lower quality although has been steadily improving.

Interestingly, a growth in the overall proportion of leisure uses within town centres over the reporting period has usually been accompanied by an improvement in the quality of the leisure offer (as defined by policy), meaning that on balance new leisure uses tend to be restaurants, cafes, pubs or other leisure uses considered of

good quality. Nevertheless, the mixed results in achieving Policy SP10 quality leisure benchmarks over the reporting period highlight the importance of ongoing monitoring and policy continuity in order to steer positive long term trends.
Lead to

iv) Perceived improvement to town centres [Target: Positive trend] **/ LPR: Satisfaction with local shopping** [LPR target: No target, should be improving];

Residents' satisfaction with shopping facilities has been surveyed yearly since 2014 through the Liveability surveys and the annual Newham Survey since 2016, and is set out in Table SP-OUT4iv below. Overall, satisfaction has remained high, with the level of dissatisfaction reducing.

Table SP-OUT4iv.a – Satisfaction with local shopping facilities

	2018	2017	2016	2015	2014
Percentage of residents rating shopping facilities as good, very good or excellent	83%	83%	91%	82%	78%
Percentage of residents rating shopping facilities as poor, very poor or extremely poor	5%	5%	2%	6%	8%

Source: Liveability Surveys to 2015, Annual Residents Surveys since 2016

The Liveability Survey 2015 found that residents of Royal Docks were significantly more likely than residents of other Wards to rate shopping facilities as poor (16%), although to a lesser extent than in 2014 (34%). This is reflected by the fact that shopping facilities in the Royal Docks have historically been poor given the industrial heritage and the degree of severance from the rest of the borough's town and local centres. However, as already evident from improving satisfaction in the area, the significant scale of development taking place (at Royal Wharf) and planned for in the area over the lifetime of the Local Plan will transform provision with delivery of a series of new local centres.

Indicator SP-OP6 which outlines planned investments into Newham's town centres is also relevant here, with improvements to the quality and diversity of uses and the public realm playing an important part in maintaining or improving residents' satisfaction with their local shopping facilities.

The Town Centre and Retail Study Update 2016 also provided commentary on the quality of the shopping experience in Newham's town centres, as summarised in Table SP-OUT4iv.b below. The study identified weaknesses and opportunities that have been taken forward through the Local Plan Review in updating the spatial strategy for each town centre as set out in revised spatial policies S2-6 and Policy INF5 – in some cases this has meant continuity of Core Strategy policy.

Table SP-OUT4iv.b – Quality of shopping experience, 2010 to 2016

Town Centre	Town Centres and Retail Study Update 2016 Conclusions
Stratford	Performing well with complementary offer to Westfield. Qualitative improvement to foodstore offer in Stratford has not happened. Morrisons and Sainsbury's much the same as before. In the restaurant sector, Stratford City is now equally as competitive as London West End.
East Ham	Quality and offer of convenience goods foodstores remains weak. Decrease in comparison goods operators. Significant amount of leisure offer comprises betting shops (4%) and hot food takeaways (9%). Public realm and environmental investment required. Continued vulnerability to Stratford City.
Canning Town	High vacancy rates and low comparison offer. Town centre in transition, further study required after completion of regeneration works.
Forest Gate	Little change since 2010. Urban village environment and weak comparison goods offer. Public realm requires improvement. The new Crossrail Station is likely to bring associated investment and change to the centre.
Green Street	Convenience offer remains the same, anchored by Tesco Metro and Iceland. Independent operators make up majority of retailers, with an ethnic focus. Leisure services such as cafes and restaurants still low, but food outlets at East Shopping Centre have improved the situation.
East Beckton	Focused on the Asda food superstore and the Mary Rose Mall – a small parade of shops. Little change but some turnover of operators. The centre continues to perform strongly.
Gallions Reach Retail Park	Continues to perform well, with small market share loss following the opening of Stratford City. The future of retailing at Gallions Reach should be integrally linked with wide socio-economic development and change, including new housing, employment and associated infrastructure and community change.

Source: Town Centres and Retail Study Update 2016

v) Other town centre health indicators as available / [LPR: GLA town centre health checks data] [Target: monitor for positive trends or stability within healthy parameters];

GLA London Town Centre Health Checks are based on Experian GOAD data as opposed to on-site survey work and therefore not directly comparable to data from the in-house Town Centre Surveys. Nevertheless, the studies offer an important in-parallel check and comparison tool to better understand the performance of Newham's town centres within the wider pan-London network. Over the reporting period of this bulletin, the GLA have published two London Town Centre Health Checks (2013 and 2017).

Table SP-OUT4v below summarises key findings of the Town Centre Health Check reports, focusing on Stratford and East Ham as the boroughs main town centres. In addition, Appendix 2 presents an extract of the data, focusing on retail floorspace types (comparison, convenience, services and multiples), vacant floorspace, employment estimates, antisocial behaviour (ASB) records and NO2 concentration records, as key indicators of town centre vitality and environmental quality, and compares these to the London averages within each town centre type (Metropolitan, Major and District).

Table SP-OUT4v – Key Messages from the Town Centre Health Checks

Town Centre	2012 baseline	2016 baseline
London-wide trends	• More-leisure oriented functions, particularly cafes and restaurants, alongside retailing, offices, housing and civic and community functions. • Vacancy rate of 8.8%. • Strong growth in convenience shopping balanced by a fall in provision for comparison shopping.	• Retail floorspace on average 55% to 75% of all floorspace (excluding offices). • Demand and related growth is polarising in favour of a selected number of town centres (including Stratford). • Vacancy rate of 6.1%.
Stratford	• Major town centre, recommended reclassification to Metropolitan, with potential to attain International status. • Low convenience offer (10.0%) compared to other major centres (average 36.3%), but in line with Metropolitan Centres. • Third highest comparisons goods retail turnover after West End and Shephard's Bush. • Potential to improve integration between Stratford City and the original town centre should continue to be explored.	• Metropolitan town centre with potential to attain International status. • Very significant growth in occupied commercial floorspace, particularly comparison floorspace. • Experienced declining average rents over the period 2008 to 2011but rents then doubled in 2011/2012 following the opening of Stratford City and have grown strongly since.
East Ham	• Major centre. • Significant increase in betting shops (from 6 in 2007 to 10 in 2012).	• Major centre. • Decrease of 0.7% in retail rents over the period 2005 to 2016 (compound annual average growth rates).

Source: GLA

Stratford is identified as a significant growth point within the town centres network for comparison retail, leisure, offices and hotels, although this is disproportionately directed towards the LLDC side of the centre. Further monitoring is required to address ongoing concerns regarding the balance of investment between old and new, particularly for comparison retail, and regarding further physical integration between the two sides across major transport infrastructure barriers.

East Ham is qualitatively underperforming within the wider pan-London network of Major centres, as indicated by lower comparison floorspace, lower prevalence of multiple retailer floorspaces, a reduction in commercial rents and higher ASB record.

Canning Town is underperforming under all floorspace metrics, but with significant development recently completed and more under way (see Indicator SP-OP4) that will significantly boost its offer and bring it more in line with its Major town centre aspiration.

In terms of comparison retail floorspace, East Becton is underperforming compared to the District town centre average, while Green Street, reflecting its ethnic specialist focus, is more comparable to a Major centre. East Beckton is also significantly below the average District centre for service retail provision, again as a reflection of its restricted format.

Forest Gate convenience offer has been improving, but remains below District town centre average. Qualitative improvements are also required to help lower the higher than average ASB record.

Air quality is a key issue in Stratford, East Ham, Canning Town and Forest Gate, a fact also reflected by the Newham's 'Air Quality Annual Status Reports' (Environmental Health).

Finally, the Town Centre Health Check 2017 recognises that Gallions Reach Retail Park has the potential to become a Major centre, subject to demand and impact assessments, and a clear strategy for development of the town centre.

INF-OUT-5 Rebalancing the Town Centre Network

i) Trade retention and expenditure distribution [Target: increased trade retention and more even expenditure distribution, to be measured by an updated survey within 5 years];

Building on the data from the Town Centre and Retail Study 2010 and its 2016 update, Tables INF-OUT5i.a and INF-OUT5i.b overleaf, outline changes in expenditure trade draw and market share for the borough's six town centres for comparison and convenience shopping respectively (with convenience market share considered by sub-areas).

The greatest change since the 2010 study has been the introduction of Westfield Stratford City as an extension of Stratford Town Centre, which has helped significantly improve borough-wide comparison expenditure retention (15.9% increase) and sub-area convenience retention (20.2% increase). However, it has also resulted in the reduction of the market share and expenditure trade draw from almost every centre. The old Stratford Town Centre has been worst affected for comparison shopping, with a reduction of market share by 4.8% and expenditure loss of £27,416,000, compared to 2010. This highlights the importance of continued cross-boundary cooperation with the LLDC to secure a more balanced, complementary growth of the overall Stratford town centre.

Table INF-OUT5i.a: Comparison shopping expenditure and distribution

	2010		2015		Change	
	Trade Draw (£000)	Market Share* (%)	Trade Draw (£000)	Market Share* (%)	Trade Draw (£000)	Market Share* (%)
Stratford (whole)	£65,963	9.8	£218,948	28.4	+£152,985	+18.6
Stratford Town Centre (old)	£65,963	9.8	£38,547	5.0	-£27,416	-4.8
Stratford City (new)	n/a	n/a	£180,401	23.4	n/a	n/a
East Ham	£73,556	10.9	£70,243	9.1	-£3,313	-1.8
Green Street	£9,963	1.5	£7,097	0.9	-£2,866	-0.4
Forest Gate	£4,073	0.6	£6,603	0.9	+£2,530	+0.3
Canning Town	£2,542	0.4	£2,465	0.3	-£77	-0.1
Beckton**	£157,480	23.3	£174,557	22.7	+£17,077	-0.6
Borough-wide	**£313,577**	**46.5**	**£479,913**	**62.3**	**£166,336**	**+15.9**

* As % of overall available expenditure in the Town Centre and Retail Study survey area;
** including nearby retail parks.

Table INF-OUT5i.b: Convenience shopping expenditure and distribution

	2010		2015		Change	
	Trade Draw (£000)	Sub-area Market Share* (%)	Trade Draw (£000)	Sub-area Market Share* (%)	Trade Draw (£000)	Sub-area Market Share* (%)
Stratford (whole)	£64,354	40.7	£89,575	60.9	+£25,221	+20.2
East Ham	£43,798	14.8	£46,403	14.2	+£2,605	-0.6
Green Street	£37,067	9.0	£20,581	4.1	-£16,486	-4.9
Forest Gate	£11,897	9.1	£16,376	10.0	+£4,479	+0.9
Canning Town	£12,075	8.1	£11,448	4.8	-£627	-3.3
Beckton**	£118,935	25.6	£157,965	31.1	+£39,030	+5.5
Borough-wide	**£288,127**	**52.9**	**£342,347**	**57.3**	**+£54,220**	**+4.45**

* As % of trade draw from overall available expenditure in respective sub-areas: North West (Stratford), North East (Forest), South West (Canning Town) and South East (East Ham, Green Street and East Beckton); ** including nearby retail parks.

East Beckton town centre and the retail parks in the area have seen the second best convenience shopping increases, with 5.5% market share growth in the South East sub-area, at the expense of Green Street and East Ham. This growth compensated for a minor decrease of 0.6% in the borough-wide market share for comparison shopping, towards Stratford. Moreover, population increases in its catchment have meant that overall the town centre has benefitted from £56m trade draw increase.

Forest Gate has seen a minor increase for both comparison and convenience shopping, in part due in part to its 'urban village'/specialist local offer and public realm investments (see SP6.iii above) improving the vitality of the centre.

East Ham has seen the second largest loss in comparison shopping market share, at 1.8%, to Stratford; and a smaller reduction in its convenience market share, at 0.6%, to East Beckton and its surrounding retail parks. While population growth in the area between 2010 and 2015 has gone some way towards compensating for these losses, the overall trade draw for comparison and convenience has fallen by about £0.7m.

Green Street has seen a significant loss in its sub-area market share for convenience shopping (4.9%), mostly to Beckton area and other out-of-borough destinations, and a minor reduction in comparison shopping market share (0.4%), amounting to an overall decrease in trade draw of over £19m. While some of this loss may have been compensated by trade drawn from further afield in London and elsewhere due to its specialist ethnic focus, this still represents a significant weakening of the town centre's vitality and viability.

As indicated above, the Council has submitted in March 2019 an expression of interest for the government's Future High Street Fund to help tackle the weaknesses of East Ham and Green Street town centres.

Canning Town has continued to perform poorly across both comparison and convenience retail trade draw and market share, with trade leaking to Stratford and Beckton area while regeneration is under way. Careful monitoring will be needed to review improvements as significant development is completed and becomes occupied.

ii) Town centre health [Target: stable or improved health as per different criteria, when benchmarked against other London centres; interim assessment via biennial local survey work according to individual centre requirements by the policy].

See Indicators under SP-OUT4 above for an assessment based on London Town Centre Health Checks.

Appendix 3, drawing on assessments against the other indicators in this bulletin, outlines the progress against growth requirements for each town centre set out in Core Strategy Policy INF5 and Spatial Policies S2-6 as relevant. It shows that significant progress towards achieving individual policy objectives have has been achieved for Stratford, and to a degree for Canning Town (this town centre continues to be in transition). Investment and change has been more limited in the other town centres.

Conclusions

The below table sets out a final traffic light assessment of indicators in this bulletin.

Good = Significant improvements demonstrated through policy interventions
Neutral = Some improvements, further monitoring require
Poor = Little to no improvement achieved

Indicator	**Overall assessment 2012/13 to 2017/18**
Outputs	
SP-OP6 Supporting Quality Town and Local Centres: i) Monitor Town Centre Management; ii) Monitor Community uses in Town Centres; iii) Monitor Town Centre Investment;	**Good** Monitoring indicates that, while there is no longer a town centres management framework, investment through both public and private action has continued. Community uses in all town centres are diversifying, helping to support their vitality and viability. See also indicator SP-OUT4 which indicates continued close monitoring of performance of town centres is required, not least in the face of existing and expanding permitted development rights.
INF-OP5 Strategic Management of the Town Centre Network: i) Floorspace for town centre uses;	**Neutral** Retail floorspace change is in line with projected need, except for Canning Town which experiences a planned over-provision. Diversification of uses towards community and leisure uses is supporting vitality and viability.

Indicator	Overall assessment 2012/13 to 2017/18
ii) Delivery of town centre strategic sites and new local centres as part of strategic sites; iii) Conversion of out of centre commercial to residential use.	Mixed progress on town/local centre strategic sites – some good, some likely to experience delivery delay. Local Plan (2018) with new strategic site allocations (S01 and S20) providing additional clarity to the Town Centres Network in the Royal Docks and Beckton areas. Slow progress on out-of-centre conversions to residential, policy continuity necessary.
INF-OP-9 Use and Robustness of INF Policies	**Good** Policies appropriately and consistently used in the majority of cases. Good performance at appeals.
Outcomes	
SP-OUT4 Town Centre Health: i) Vacancy levels, and non-retail uses in primary frontages in town; ii) Historic buildings at risk within defined town centres; iii) Quality Leisure: Proportion of leisure uses in town centres that are betting shops, amusement arcades and hot food takeaways; iv) Perceived improvement to town centres; iv) LPR: Satisfaction with local shopping; v) Other town centre health indicators as available (LPR: GLA town centre health checks data);	**Good/Neutral** The network is performing well overall, as reflected by: • low vacancy rates (except Forest Gate) compared to national averages; • robust retail within primary shopping frontages in line with Policy SP10; and • high levels of satisfaction with local shopping facilities reported by residents. The quality of leisure uses in all but Stratford and East Beckton needs improving and therefore a continuation of the cumulative impact Policy SP10 (Policy SP9 of Local Plan 2018) restricting betting shops and takeaways should be carried forward. Heritage assets are generally well used and integrated within the town centres' function, with only one building remaining on Historic England's 'Heritage at Risk' Register. GLA Town Centre Health indicators show that, with the exception of Stratford Metropolitan and to some degree Green Street, Newham's town centres are generally under-performing compared to the average town centre in each respective category.

Indicator	Overall assessment 2012/13 to 2017/18
INF-OUT-5 Rebalancing the Town Centre Network: i) Trade retention and expenditure distribution; ii) Town centre health.	**Neutral** Borough-wide increase in trade retention, primarily due to the opening of Stratford City (LLDC). More minor positive result also noted for Forest Gate, and East Beckton and its retail parks in terms of convenience shopping. Ongoing monitoring is required for the performance of Canning Town against recent and ongoing investment, and of Stratford 'old town centre' against Stratford City and wider LLDC planned growth. Green Street and East Ham have seen the highest decreases in trade draw and market share for both convenience and comparison shopping, affecting their wider town centre network balance. Mixed results in terms of delivery of strategic sites and other town centre specific policy requirements, as per Appendix 3.

Appendix 1	**Approved applications for A1/A2/A3/A5 uses in out-of-centre locations and not on Strategic Sites, 2012/13 to 2018/19**				
Application Ref	**Location**	**Relevant A1/A2/A3/A5 GIA floorspace**	**Nearest Town or Local Centre(s) (distance)**	**Application of Policies INF5, SP6 & SP7** (where relevant) **and notes.**	**Status**
12/00782/COU	450 Romford Road, Forest Gate E7 8DF	99.5sq.m	Forest Gate (circa 650m)	Change of use from A1 (retail sale of goods) to A2 (Estate agents). Policy Team objection, however Officer took the view that, given the distance to the town centres there is no impact on their vitality and viability. No application of Policy SP7.	Complete
12/01048/FUL	Unit 4A Beckton Retail Park, Alpine Way, Beckton E6 6LA	2,500sq.m existing	East Beckton (circa 150m)	Subdivision of existing 2 retail units into 3; no creation of new floorspace and no material change of use to be considered. Town Centre policies not considered. Site allocated through Local Plan 2018 for redevelopment as S02: Alpine Way.	Complete
12/01292/FUL	525 Katherine Road, Green Street E7 8EB	130sq.m	Forest Gate (circa 850m) Green Street (circa 850m)	Retrospective application for retention of extension built circa 2007. Town Centre policies not considered, approved on design grounds.	Complete
13/00137/FUL	90-92 Katherine Road, East Ham E6 1EN	152sq.m	East Ham (circa 350m) Boleyn LC (circa 850m)	Rebuild of rear extension. Town Centre policies not considered, approved on design grounds.	Complete
13/00452/FUL	714 Romford Road, Manor Park E12 6BT	70sq.m existing +18sq.m	Manor Park (circa 450m)	Rear extension. Town Centre policies not considered, approved on design grounds.	Complete
13/00503/FUL	73-75 Katherine Road, East Ham E6 1EW	125sq.m	East Ham (circa 350m) Green Street (circa 800m) Boleyn LC (circa 750m)	Change of use of No 73 from A1 to A3 and alterations to create a single unit. Policy objection, but Officer took the view that no additional floorspace is being created and that the principal of A3 use at the site is established (via No 75) and accepted. Policy SP7 not considered.	Part-complete (COU of No 73 to A3 use).

Appendix 1	**Approved applications for A1/A2/A3/A5 uses in out-of-centre locations and not on Strategic Sites, 2012/13 to 2018/19**				
Application Ref	**Location**	**Relevant A1/A2/A3/A5 GIA floorspace**	**Nearest Town or Local Centre(s) (distance)**	**Application of Policies INF5, SP6 & SP7** (where relevant) **and notes.**	**Status**
13/00898/FUL	110 Browning Road, Manor Park E12 6RD	76sqm existing +8sq.m	High Street North LC (circa 400m) East Ham (circa 800m)	Rear and side extension. Town Centre policies not considered, approved on design grounds.	Complete
13/01883/FUL	Land Adjacent KFC, Gateway Retail Park, Claps Gate Lane, Beckton E6 6LG	157 sq.m	East Beckton (> 1km)	New drive-through A1/A3 unit, ancillary to the existing retail (0.79% of overall retail floorspace) rather than an attractor in its own right; drive through component may be anticipated to generate trip diversion and expenditure of a very particular type. Below locally adopted 300sqm threshold for retail impact assessment.	Lapsed
13/02163/FUL	225 Barking Road London E6 1LB	68sq,m existing +12sq.m	East Ham (circa 300m) Boleyn LC (circa 500m)	Side infill extension. Town Centre policies not considered, approved on design grounds.	Complete
14/01085/FUL	752 Romford Road, Manor Park E12 6BU	77sq.m existing +50sq.m	Manor Park (circa 600m)	Outbuilding. Intensification not significant, no significant detrimental impact on nearby town centres. Policy SP7 not used.	Not known
14/02893/FUL	West Ham United Football Club, Green Street E13 9AZ	146sq.m (flexible)	Green Street (circa 250m) Boleyn LC (circa 150m)	Major mixed use redevelopment of former station site, including 2 small commercial units in flexible A1/A2/A3/A4/B1/D1/D2. Quantum of commercial significantly reduced through pre-app discussions; it allows for some activation of Green Street frontage and provision of local facilities for local residents and would not have a detrimental impact on existing town centres.	Started, commercial in last 2 phases

Appendix 1	**Approved applications for A1/A2/A3/A5 uses in out-of-centre locations and not on Strategic Sites, 2012/13 to 2018/19**				
Application Ref	**Location**	**Relevant A1/A2/A3/A5 GIA floorspace**	**Nearest Town or Local Centre(s) (distance)**	**Application of Policies INF5, SP6 & SP7** (where relevant) **and notes.**	**Status**
16/00224/FUL	Pontoon Dock, North Woolwich Road, Royal Docks E16 2AF	769sq.m (flexible)	Canning Town (> 2km) Custom House LC (> 1km) North Woolwich LC (> 2km)	Major housing-led development, including 769sq.m of flexible A1/A2/A3/B1/D1/D2 to support the creation of a 'plaza' style area which adjoins the DLR station. Scale of commercial considered to be of minor, and not anticipated to impact upon the identified centres within the locality.	Started
16/00581/FUL	356-358 Barking Road, Plaistow E13 8HL	308sq.m	Abbey Arms LC (adjacent)	Re-provision of two commercial uses considered acceptable given adjacent local centre, and existing 'overspill' of local centre uses. Policy SP7 not used.	Not started
16/00787/FUL	Land Adjacent KFC, Gateway Retail Park, Claps Gate Lane, Beckton E6 6LG	154sq.m	East Beckton (> 1km)	Previous approval (2013/14). Proposed A1/A3 unit less than 1% of the overall retail floorspace, and as such could be regarded as de minimis; below locally adopted 300sqm threshold for retail impact assessment.	Complete
16/00819/FUL	Site We5b, 12 Western Gateway, Canning Town E16 1AD	172sq.m (flexible)	Canning Town (> 1km) Custom House LC (circa 500m)	Major housing-led development (tower), including a flexible A1/A2/A3/A4/B1 use. Town Centre policies not considered, commercial use considered acceptable within Excel and Royal Victoria West Employment Hub.	Complete
16/03996/FUL	Unit 25 to 26, Gallions Reach Shopping Park, 3 Armada Way, Beckton E6 7ER	449sq.m	East Beckton (> 1km)	Insertion of mezzanine floorspace to support the Decathlon store. Principal of retail use at the site established. Sequential and impact tests satisfactorily passed given the range of goods that are to be sold at the site.	Complete

Appendix 1	**Approved applications for A1/A2/A3/A5 uses in out-of-centre locations and not on Strategic Sites, 2012/13 to 2018/19**				
Application Ref	**Location**	**Relevant A1/A2/A3/A5 GIA floorspace**	**Nearest Town or Local Centre(s) (distance)**	**Application of Policies INF5, SP6 & SP7** (where relevant) **and notes.**	**Status**
17/00461/FUL	Land Adjacent Unit 6, Gateway Retail Park, Claps Gate Lane, Beckton E6 6LG	406sq.m	East Beckton (> 1km)	Development to provide 3 units for food operators considered acceptable in the Gateway Retail Park given increase of commercial floor space less than 3%; proposed units to serve primarily people already visiting the retail parks.	Complete
18/00889/FUL	753A Romford Road, Manor Park E12 5AW	52sq.m	Manor Park (circa 250m)	Change of use from A1 to A3/A4. Wight given to allowed appeal at 991 Romford Road which was based on vibrancy of local parade, in spite of out of centre location. A3/A4 uses considered typical on the edge of town centre locations and therefore acceptable.	Not started

Appendix 2	GLA Town Centre Health Checks (2013 and 2017) – data extract															
Town Centre (GLA designation)	**Comparison retail floorspace (sq.m)**		**Convenience retail floorspace (sq.m)**		**Service retail floorspace (sq.m)**		**Vacant retail floorspace (sq.m)**		**Vacant non-retail floorspace (sq.m)**		**Multiple retailers floorspace (sq.m)**		**Town centre base employee estimates (No., 2015)**	**Anti-social behaviour**		**NO2 concentration (µg/m3) - Mean Value (2013)**
	2012	**2016**	**2012**	**2016**	**2012**	**2016**	**2012**	**2016**	**2012**	**2016**	**2012**	**2016**		**2012**	**2016**	
Stratford (Major in 2012; now Metropolitan)	19,270	129,610	11,240	23,590	1,270	2,510	3,130	11,380	0	1,610	36,990	168,950	9,900	1,345	820	40.9
Average Metropolitan Centre	83,184	91,428	13,692	15,773	5,175	5,674	12,035	8,805	0	2,712	112,134	120,961	11,762	1,149	764	39.8
East Ham (Major)	21,020	20,480	11,850	11,660	3,030	2,430	1,310	1,360	0	680	27,490	26,560	1,600	1,192	644	46.6
Average Major Centre	26,256	25,097	10,509	11,244	4,422	4,427	4,880	3,593	0	1,032	39,667	38,889	6,824	846	537	46.3

Appendix 2	**GLA Town Centre Health Checks (2013 and 2017) – data extract**																
Town Centre (GLA designation)	**Comparison retail floorspace (sq.m)**		**Convenience retail floorspace (sq.m)**		**Service retail floorspace (sq.m)**		**Vacant retail floorspace (sq.m)**		**Vacant non-retail floorspace (sq.m)**		**Multiple retailers floorspace (sq.m)**		**Town centre base employee estimates (No., 2015)**	**Anti-social behaviour**		**NO2 concentration (µg/m3) - Mean Value (2013)**
	2012	**2016**	**2012**	**2016**	**2012**	**2016**	**2012**	**2016**	**2012**	**2016**	**2012**	**2016**		**2012**	**2016**	
Canning Town (District)	1,620	1,620	3,580	3,120	1,220	1,440	350	2,180	0	0	4,800	4,280	400	311	210	50.4
Forest Gate (District)	7,030	5,740	3,770	4,840	2,920	2,880	2,580	1,510	0	110	7,630	7,590	300	550	379	43.1
Green Street (District)	18,704	20,104	8,710	9,850	2,630	2,540	6,970	1,950	0	660	7,990	7,340	500	517	313	38.0
East Beckton (District)	850	850	8,760	8,760	600	600	0	0	0	0	12,960	12,730	600	220	156	35.0
Average District Centre	6,176	5,681	5,248	5,250	2,478	2,423	1,711	1,195	0	358	10,481	10,038	970	369	239	42.8

Appendix 3	Town Centre Health – Progress against policy requirements/aspirations				
Town Centre	**London hierarchy**		**Policy requirements/aspirations**		
	Policy aspiration	**Current assessment**	**INF5**	**Spatial Policy**	**Assessment**
Stratford	Metropolitan	From Major to Metropolitan, with potential for International and CAZ status.	Transformational change to the scale, layout and nature of the offer whilst continuing to meet local needs.	Employment hub and centre for strategic retail growth, with significant amount of higher order comparison goods. Focus for office, hotels and tourism, arts and culture developments. To accommodate higher and further education, market facilities, urban and green/blue spaces, community uses. Location for boroughs tallest buildings. Measure to integrate the old town centre with Stratford City and enhance links to neighbourhoods. Regeneration investment, and creation of two-way vehicle movement around the shopping centre gyratory.	Transformational change largely on LLDC side, more modest change to main town centre uses in the old part. Higher order comparison offer concentrated at Stratford City, with the old centre presenting a complementary medium and low order offer and a higher focus on convenience shopping. Higher education campuses on LLDC side, including at Here East and Angel Lane. Continued outdoor market facilities. 298 new hotel rooms and 2,764 sq.m office floorspace approved, with additional growth on LLDC side. Significant public realm and townscape change, Including ongoing works to transform the gyratory system to two-way traffic, and a number of tall buildings.
East Ham	Major	Major status retained	Growth and renewal of floorspace, particularly aimed at improving its comparison, quality leisure and community offer; retaining	Continued borough-wide importance, with recognised heritage assets, employment, civic and community spaces, good accessibility, and vibrant independent and multiplier offer mix. Better quality and mix of offer, including night-time economy uses. Improved public realm with attractive gateways and revitalised	Comparison offer, trade draw and market share reduced. New/ renewed retail and other A Use Classes floorspace in the pipeline. Strong independent offer maintained. Community offer enhanced, particularly by new further education/training provision. Night time economy and leisure offer has reduced, and continued over-representation

Appendix 3	Town Centre Health – Progress against policy requirements/aspirations				
Town Centre	London hierarchy		Policy requirements/aspirations		
	Policy aspiration	Current assessment	INF5	Spatial Policy	Assessment
			its independent retailers.	and enhanced heritage assets. Town centre will be less linear, with primary activity spreading out towards its wider boundaries at the southern end, and clearer delineation at its northern end. Complementary high density residential development.	of hot food takeaways, betting shops and amusement arcades. The listed Technical College refurbished and re-purposed as Newham Collegiate Sixth Form. Significant new residential development in the pipeline on strategic sites S25 and S26. No public realm investment over the reporting period.
Green Street	District	District status retained	Maintain and develop specialist ethnic centre role. Growth and renewal of floorspace, creating a wider range of unit sizes and aiming to expand its comparison, community and quality leisure offer but retain its independent retailers.	Maintain specialist ethnic retail identity with a local to international draw, popular market place and independent shops and quality evening offer that continues to evolve. Development of complementary employment. Innovation in design and formats, and better overall environment. Queens market will be an important meeting place for the local community, reinforced through co-location of other community uses and development densities appropriate for its public transport accessibility.	Strong independent offer building on specialist ethnic role, but some loss of comparison trade draw and market share from the local/borough market. Significant loss of convenience trade draw and of market share. Additional floospace provided by new East Shopping Centre; little change otherwise. Quantum of leisure offer remained stable, with quality improving although still below Policy SP10 benchmarks. Queens Market continues to operate successfully. No progress on its strategic site allocation, but significant edge of centre development at former West Ham United FC grounds, including community facility floorspace. No significant employment offer growth. No significant public realm improvements since 2011/12.

Appendix 3	Town Centre Health – Progress against policy requirements/aspirations				
Town Centre	London hierarchy		Policy requirements/aspirations		
	Policy aspiration	Current assessment	INF5	Spatial Policy	Assessment
Forest Gate	District	District status retained	Growth and renewal of floorspace to better meet a wide range of local community needs, targeting a medium-sized foodstore and comparison retailers but retaining its independent offer.	Attractive and vibrant centre, with cafes, community and cultural facilities and independent shops together with a medium-sized food store. Town centre environment and development to complement, integrate with and enhance its heritage identity and popularity of local neighbourhoods, building on opportunities presented by Crossrail and identified development sites.	Strong independent offer and retain urban village feel. Small reduction in retail floospace. Healthy retail-focused primary shopping frontages, but significant overall town centre vacancies. Some change towards community (primarily training centres) and cultural uses; little change overall. Nevertheless, small growth in trade draw and market share for both convenience and comparison shopping. Significant new retail and some leisure floorspace in the pipeline on strategic site S24. Some growth in leisure offer, but quality remains below Policy SP10 targets. Investment in public realm as part of Crossrail and other LIP/Heritage Lottery Fund projects.
Canning Town	Major	District status retained	Transformational change to the scale, layout and nature of the offer whilst continuing to meet local needs.	Revitalised, expanded and re-oriented town centre, benefiting from a remodelled junction and public realm, a new food store south of Barking Road, a modernised market space, better links to the station and bus interchange. Better quality and mix of shops and other uses, including night time economy.	Significant regeneration under way, but interim weakness in ability to meet local needs (significant trade leakages, and high vacancies of new frontages). Diversification of leisure offer and improvement in its overall quality. Junction remodelling delivered, alongside new/renewed public realm enhancements, including new market space and pedestrian/cycling infrastructure.

Appendix 3	Town Centre Health – Progress against policy requirements/aspirations				
Town Centre	London hierarchy		Policy requirements/aspirations		
	Policy aspiration	Current assessment	INF5	Spatial Policy	Assessment
Beckton East	District	District status retained	Renewal of floorspace whilst enhancing its links with local neighbourhoods.	Consolidated at the eastern end close to public transport links. To become less island-based and inward-looking, with improved public realm and better links between the precinct and other shops/services in the area as well as local neighbourhoods.	No new floorspace, minor shifts in floorspace type. Minor turnover of operators. Trade draw remains healthy. Low quantity of units translates to low leisure offer, but of good quality. No major public realm enhancements.